

The Toolkit for **Higher Performing Email Marketing**

Tools and tips to optimize your email marketing



What will you find in this toolkit?

- Templates you can use at your company to organize, scale and keep track of your email marketing and testing
- A deep understanding of why A/B testing is so beneficial towards achieving your company goals
- Actionable steps on how to measurably improve your email marketing programs
- Inspiration for tests to try on your own email marketing

The User Manual:

- 01.** Why email is a great marketing investment
- 02.** Why A/B testing email is essential
- 03.** Deciding what to test
- 04.** Test ideas for emails & landing pages

The Tools:

Email Marketing Blast Template

[\[Open the Google Doc Template\]](#)

Email A/B Test Results Archive Template

[\[Open the Google Spreadsheet Template\]](#)

Ready to sign out of email for 20 minutes and read this? Let's dive in.

The background is a solid blue color with a repeating pattern of white line-art icons. These icons represent various business and marketing concepts, including email envelopes, lightbulbs, bar charts, pie charts, gears, target symbols, shopping baskets, and document outlines.

01.

Why email is a great marketing investment

EMAIL IS AN INDISPENSABLE PART OF MARKETING.

In 2013, small and medium businesses voted email marketing as the second most important marketing channel. The most important? Having a website.¹ On the spectrum of marketing functions, email is mandatory. What's more, email is a high value, highly adaptable, scalable practice with clearly quantifiable results.

6 REASONS EMAIL MARKETING IS A GREAT INVESTMENT

- **It's possible to attribute and quantify value.** You can attribute key business goals to specific emails. You measure whether contacts who receive monthly newsletters engage more with content compared to those who don't.
- **It's highly targeted.** By filtering your contact lists, you can control exactly who will receive an email.
- **It scales quickly.** Building an email campaign for 100 contacts takes the same amount of time as a campaign for 100,000 contacts.
- **It's ubiquitous.** Email is a central part of communication. 4.1 billion email accounts exist today, more than the number of Twitter and Facebook accounts combined.²
- **It has high ROI.** Emails prompt purchases at least three times more often than social media. Average order value for a customer who shops from emails is 17% higher than social media.⁵
- **It's personalized.** You can make email personal by including unique or behavioral information you have about a contact. Emails triggered based on user behavior is another way to personalize.



¹ eMarketer, "Nearly Half of B2Bs Expect Marketing Budget Bump in 2014" <http://optimize.ly/1pEr5p0>

² Radicati, "Email Statistics Report 2014-2018" <http://optimize.ly/1kLxtvT>

THE IMPORTANCE OF EMAIL IS CERTAINLY NOT WANING

and neither is the amount of it in our inboxes. The average professional receives 121 emails per day. For people receiving emails, this means less attention on each message, more skimming (and probably more filtering out of the inbox.) For people sending emails (people like you), this deluge of email is a challenge and incentive to figure out the elements of email — subject lines, calls to action, images, from name, etc. — that work best with your audience.

BUT HOW DO YOU KEEP TRACK OF ALL THE EMAIL?

Staying organized is pivotal, especially if you are increasing the number of emails you send, or collaborate with people on other teams to write them.

Sending emails about writing emails, commenting and editing is cumbersome. Here is a template to organize every email you will ever write.

**FREE RESOURCE:**

Email Marketing Blast Template

[Open the Google Doc Template](#)

The email marketing owner fills in a few parts and the email writer fills in the rest. By using this template at Optimizely, we have dramatically decreased the time it takes to go from brainstorming an email to hitting send.

02.

Why A/B testing email is essential

YOU'RE A MARKETER. NOT A MIND READER.

It's your job to add value to the business through email marketing. But the email subject line you want people to open, or the button you think people will click is not always what performs best. A/B testing is the best method to figure out what performs best. It's a tool in your toolkit to increase the performance of your emails and conversion rates. If you're investing valuable resources into email marketing, then you should invest in the practices that help you get the most value out of it.

**Besides increasing value, A/B testing helps navigate the complexity of email.**

“There is a lot of change that happens in email marketing that we have to account for constantly. It's one element that drives email marketers a little bit crazy.”

Chad White

Lead Research Analyst, Salesforce ExactTarget Marketing Cloud

Email is testable because how we read it changes constantly. The way you read your email today is probably nothing like what it looked like 10, 5 or even 1 year ago. According to reports from Movable Ink, 65% percent of all marketing emails today are opened on a mobile device. For consumers, changing email technologies is great since they make inboxes easier to manage and reading email a swifter, more enjoyable task. But for email marketers, changing environments means rapid adoption of new practices, standards, and rules. It's one element that drives email marketers a little bit crazy and makes email extremely testable.

Email is testable because humans are humans.

Testing for new findings, then re-testing them is highly important for email because people are always changing. The efficiencies or gains you uncover can be very transient. The thing that tended to work really well in the summer could be played out come winter. Thus, it's important to occasionally challenge your A/B champions. How often you should re-test depends on what you're testing. There's no hard and fast rule around it.

“One great reason to test is you really don't know if your opinion is right. We think we're experts because we write so many emails but just because we like it doesn't mean our audience necessarily will.”

Jessica Langensand

Marketing Programs Manager, Marketo

Email is testable because of the number of different audiences you reach. One basic practice of email marketing is forming different lists of contacts. The divisions can be based on the channel you acquired that contact such as blog subscription versus contact us form versus existing customers. Each of these lists has different characteristics and should receive unique messages. The right content to send a contact you acquired by a special sale offer will probably be very different than someone who filled out a “Contact us” form on your website.

Email is testable because of the various devices, styles and times people interact with it. Emails operate in many different modes: images on, images off, rendering on a tablet, rendering on a smart phone or desktop. There are many stages of interaction between a person and an email. It starts with the envelope copy: from name, subject line, and snippet or preheader text. Then you have the body copy, then the landing page. After that, there are infinite paths someone might take. Test your email because you may have exceptional envelope copy but falling short on the body copy. You can and should test at all of these stages.

What should you test? Let's dive into deciding what to test next.

"People worry about subject line a lot: *Can you use exclamation points? How long is too long?* Be bold and don't shy away from anything. Everything is fair game."

Jessica Langensand

Marketing Programs Manager, Marketo



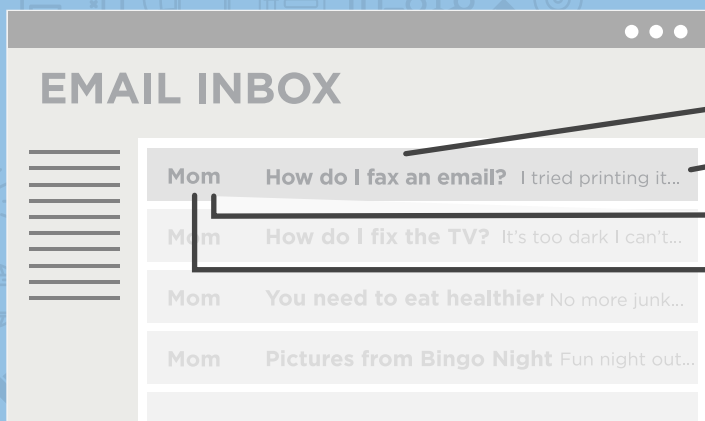
The background is a solid dark blue color with a repeating pattern of white line-art icons. These icons represent various business and technology concepts, including lightbulbs (ideas), gears (mechanics), bar charts (analytics), envelopes (communication), shopping baskets (e-commerce), and tools like wrenches and screwdrivers (development).

03.

Deciding what to test

One Email, Many Elements to Test

Emails typically have 3 parts: the envelope that previews the email, the email body, and the landing page the email directs to. Each part has testable elements.



ENVELOPE:

Subject line

Snippet text

From Email

From Name

EMAIL BODY:

Headline

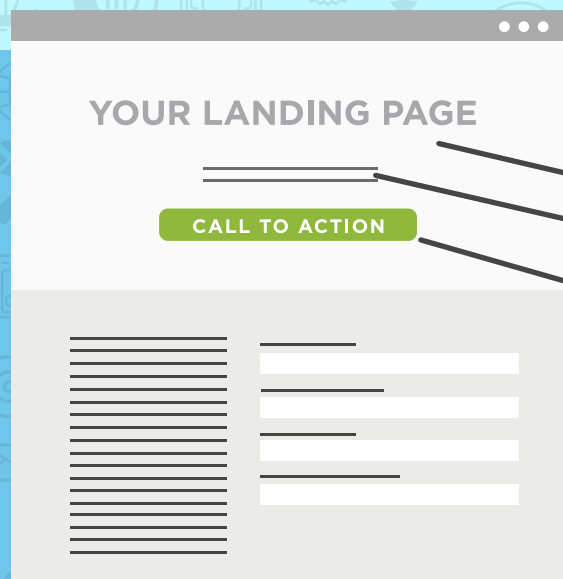
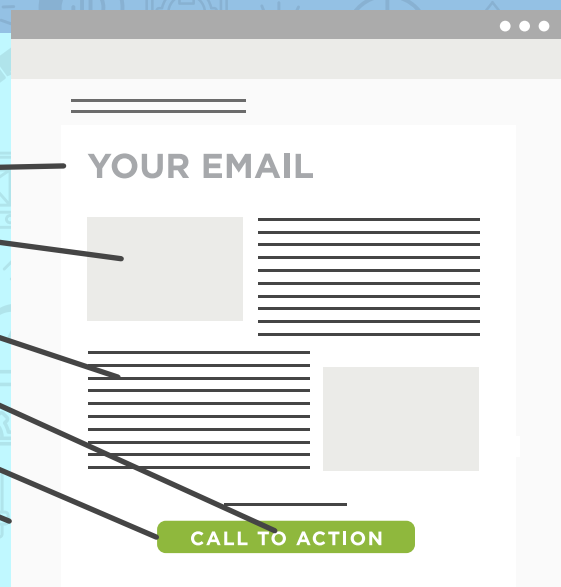
Image

Body text

Button text

Call to action

Email template



LANDING PAGE:

Headline

Value proposition

Call to action

Which landing page you use

IN SHORT, YOU CAN JUST ABOUT ANYTHING. But nobody has time to test everything. Ideas for tests that drive the most impressive improvement start with a sound hypothesis. They are focused on achieving one of your company's main goals. **Why not shoot from the hip and test a subject line here and a from name there?** Randomly running tests may lead to one-off victories but it will slow you down in the long run. Willy-nilly testing prevents continuous, iterative learning that will lead you to maximum potential in your email marketing. Try these strategies to uncover the tests that will really move the needle.

Test high impact emails that directly affect your company goals



1. IDENTIFY YOUR GOALS

Of course, you have more than one goal. For this exercise pick one very important goal such as revenue, registrations, leads, downloads, page views.

2. FIND EVERY EMAIL THAT CONTRIBUTES TO THIS GOAL

Which emails in the database help achieve this? List them all.

3. PICK THE EMAIL WITH THE HIGHEST IMPACT OR THAT REACHES THE MOST PEOPLE.

Testing high traffic emails that reach a large audience, will ensure that you see results from your test quickly. (We'll talk about sample size later) Do you have emails that are part of a nurture track? A welcome email that every new customer or subscriber receives? These emails are great places to focus testing. Focus on just one email for now. You will be itching to test more later.

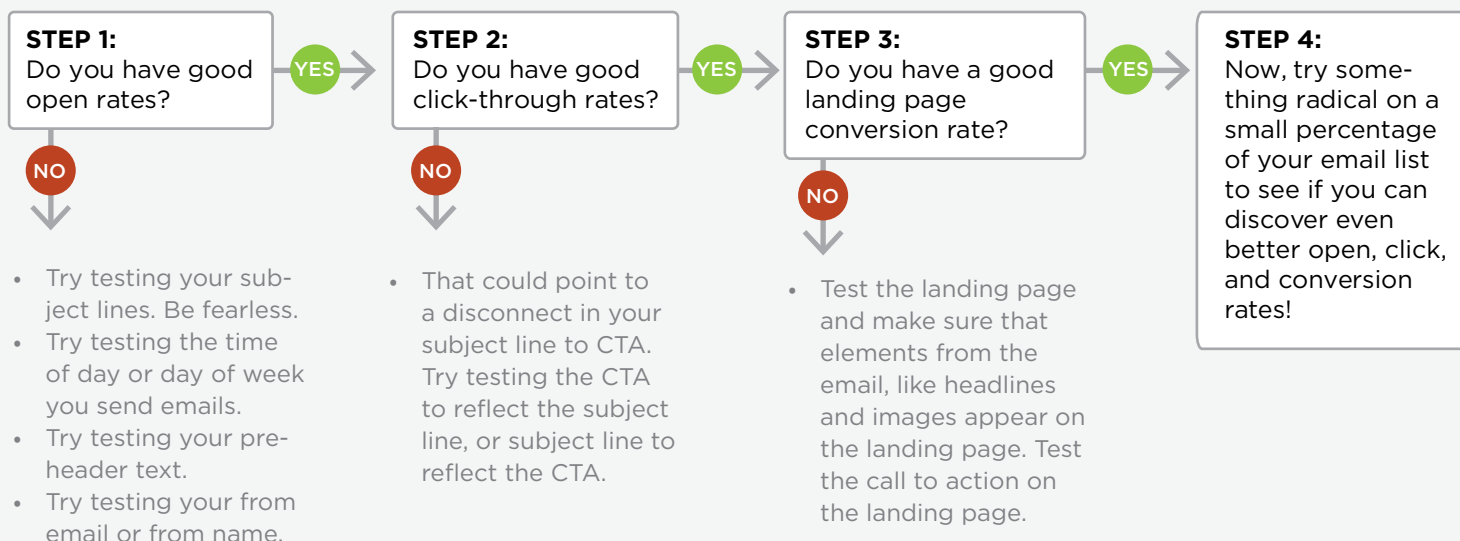
4. NOW SELECT A VARIABLE TO TEST.

The flow chart on the next page will help you decide which one...

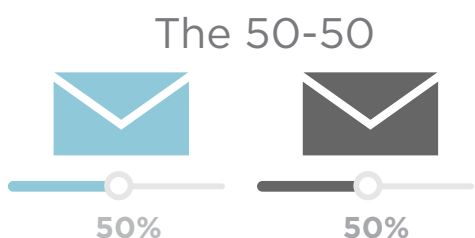
Which Part of an Email Should I Test?

4 Steps to Identify Your Next Experiment

You can test anything when it comes to email, but no one has time to test everything. Use these 4 steps to decide where to focus for maximum impact.



Types of Tests to Run:

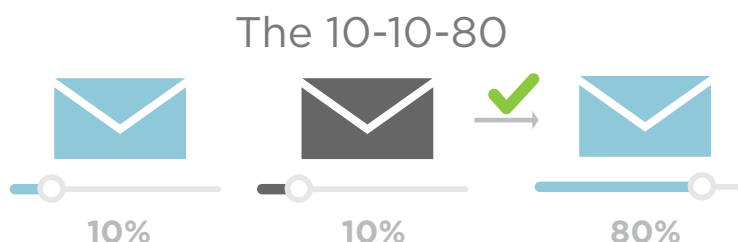


What is it?

A style of test where you send version A to 50% of your list and version B to the other 50% of your list—an even split down the middle.

When should you use it?

Use a 50-50 test when you're testing emails you send frequently such as newsletters, daily/weekly/monthly digests, product announcements, or sale alerts. Use this type of test when you are looking for results that you will reuse again and again.



What is it?

Another style of test when you send A to 10% of your list, B to 10% get a confident result and send the winner to the remaining 80% of list.

When should you use it?

The 10-10-80 is useful whenever you want to test an element of an email that's part of a time sensitive campaign, AND you have a very large list.

Let's say you're planning a one-off marketing campaign with 5 emails that you'll send to your entire list. This is the perfect scenario for a 10-10-80 because you want to get quick results on which elements are performing best so you can apply those lessons on the remaining campaign emails. This way, you will capture as much value possible from the campaign.

BE SYSTEMATIC ABOUT TESTING. Identify low performing areas where you can achieve fast gains and then commit to a testing calendar. Come up with a list of hypotheses you have and design tests around them. Hopefully some tests will produce grand slams. Quite often though it takes many tests to find one that drives a meaningful difference between two variations. Don't be discouraged! Use an alias to subscribe to emails from other brands for constant inspiration on future experiments.

[Click to save your own copy of the Email A/B Test Results Archive to keep your tests organized.](#)

Landing Pages & Email: A Vital Connection

“The biggest crime is sending people to your homepage from email. Don't make visitors work. Hold their hand.”

Chad White

Lead Research Analyst, Salesforce ExactTarget Marketing Cloud

The landing page you direct people to is equally important as the email itself. **The goal of email marketing is not open rate.** The goal is full conversions. The most important thing you can do for email landing pages is to make sure that it's painfully clear people have arrived at the right place. There should be a very clear flow from the first interaction with the email all the way to the landing page it links to.

The envelope copy should relate to the body copy, which should connect to the headline and body copy on the landing page. Reuse images from the email to reinforce congruency. Reuse headlines. The more you make people think, the worse your conversion rates will be. **Most of the time, good flow means keeping things really simple and obvious.**



PART OF BEING SYSTEMATIC MEANS KEEPING A RECORD.

Once you get started experimenting, you will fly through tests quickly. Keep all of the hypotheses, variations and results in one place with an A/B test archive. We use one at Optimizely to keep track of every test. We refer back to it often, especially when we're writing new emails.

We've turned it into a template for you to use with your email testing.

**FREE RESOURCE**

Email A/B Test Results Archive Template

[Open the Google Spreadsheet Template](#)

The archive is more than just a track record of what you've tested—it also shows results. The template archive includes formulas to calculate statistical significance based off the sample size you've tested. In other words, the formulas in the spreadsheet will let you know whether your results are accurate or false positives or false negatives.

PRO TIP: USING A LARGER SAMPLE SIZE WILL ALWAYS HELP YOU REDUCE FALSE POSITIVES AND FALSE NEGATIVES.

In order to calculate whether or not our email A/B tests are statistically significant, we export results from our email marketing software and do the analysis ourselves in a spreadsheet.

Email A/B Test Results From the Optimizely Archive

At Optimizely, we A/B test every email that goes out to over 2,000 contacts. This is a snapshot of some of those test hypotheses, the variations and results.

Subject Line Tests

HYPOTHESIS	A	B	RESULTS
Leads are more likely to open and click if the subject line is specific about the piece of content included	Why You're Crazy to Spend on SEM But Not A/B Testing	[Ebook] Why You're Crazy to Spend on SEM But Not A/B Testing	Subject line B won, increasing click rates by 33% with >99.99% confidence.
Leads are more likely to take action on a deadline framed as a date than a countdown.	Submit Your Test Before March 1st	5 Days Left to Win Awards For Your A/B Tests	Subject line A increased open rate by 17.8% with 99.87% confidence.
Citing a numerical increase of a key metric in the subject line will increase engagement with this email	What do your website visitors know that you don't?	Let your website visitors show you how to increase sales 43%	Subject line B won and increased clicks by 18% with >99.99% confidence.

Email Call to Action Tests

HYPOTHESIS	A	B	RESULTS
Leads are more likely to click on something that doesn't imply an immediate commitment.	Learn More	Submit Your Story Today!	CTA A won, lifting click-through by 37.5% with a 95.3% confidence level.

Send Time

HYPOTHESIS	A	B	RESULTS
Sending out an email at a time that is closest to global working hours (7am) will result in more opens	7 am send time	4 pm send time	Send time B increased opens by 8.5% with a 99.9% confidence

The background of the entire slide is a dark blue field filled with a repeating pattern of white line-art icons. These icons represent various business and marketing concepts, including email envelopes, shopping carts, lightbulbs, target symbols, gears, briefcases, and charts.

04.

Test ideas for emails & landing pages

Test ideas for emails and landing pages from:

- The New York Times
- Groupon
- Asos
- Southwest Airlines

Find inspiration for your own tests with these suggestions...

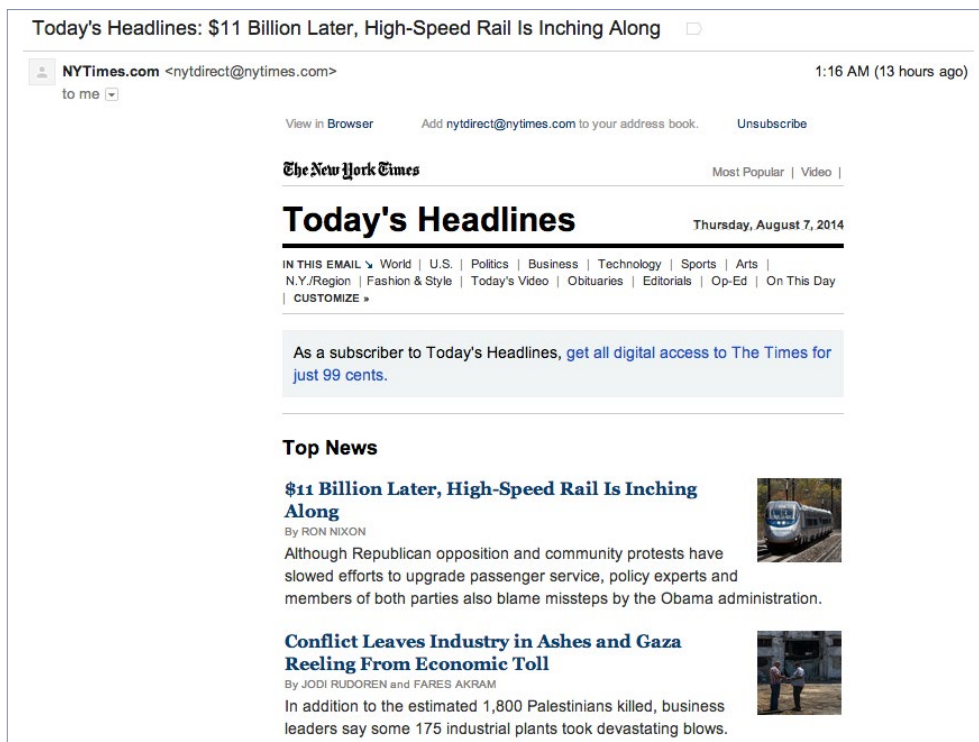
Today's Headlines from The New York Times

The New York Times' Today's Headlines email lands in inboxes every day in the very early morning hours. The Times could test many elements of this email to increase click through rates and engagement with content on the website.

EMAIL:

Try emphasizing "Customize"

A hypothesis to test is whether or not people would be more engaged with this email if they customized it to their liking. So, they can try displaying the call to action to customize more prominently. Perhaps replace it with the digital access banner. Better yet, the Times can try taking their best guess at how to organize the categories based on a reader's previous engagement and test whether or not personalization is effective.



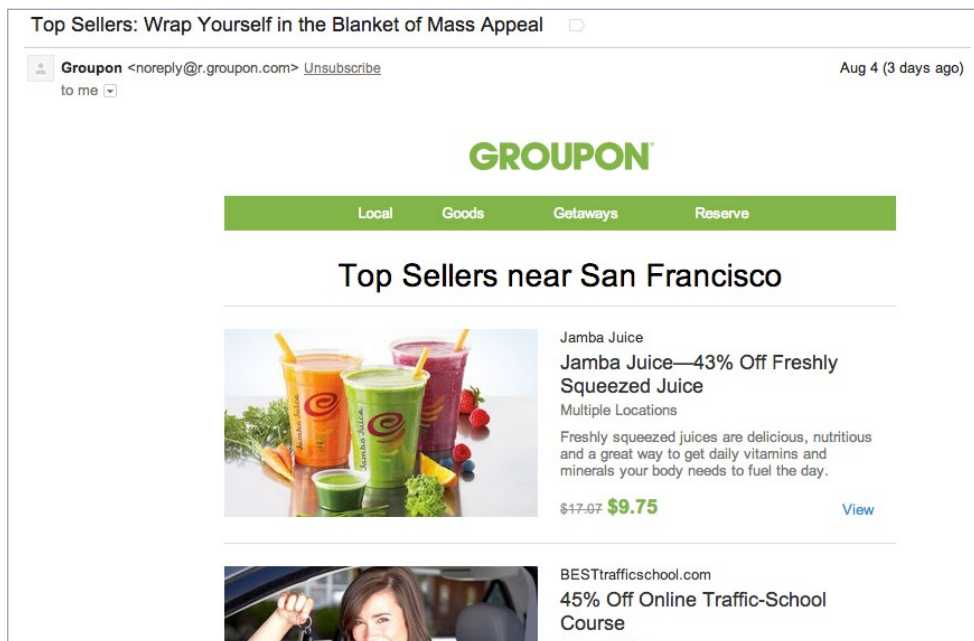
LANDING PAGE:

Try featuring other top news.

Clicking on the first headline under Top News takes a reader to the article page. To keep readers viewing articles, they can try aggregating other Top News, in the display across the top of the page.

Daily Deal Coupons from Groupon

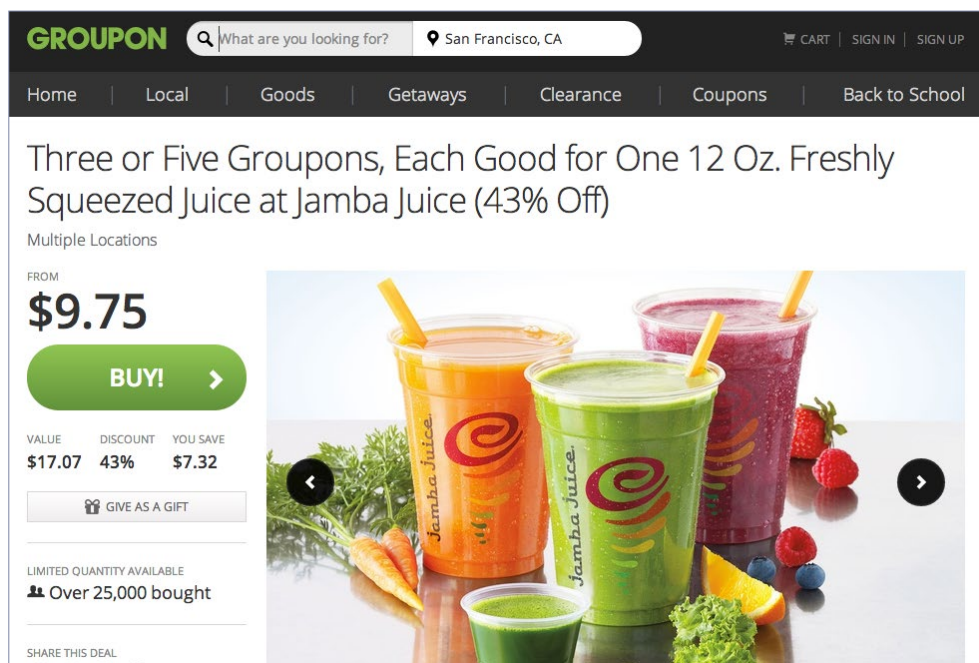
This email from Groupon features deals in the recipient's local area based on the location he or she defined. In a digest email like this, they may try making more information—like which brands are featured this week—discoverable more readily.



EMAIL:

Test stacking more information higher in the email. To give readers an at-a-glance view of what's inside this long, information-rich email, Groupon can try adding an all up list of brands below the headline. Display the list horizontally so it doesn't make the email significantly longer.

Test link formatting. To increase click-through rate in this email, Groupon can try making the headline a link. Also, they can experiment with making the "view" button a headline in this email is not a link.



LANDING PAGE:

Test a landing page of all local deals. The deal links in the email land on deal-specific pages. Instead, they might add an option to see all local deals in one view.

Test removing navigation. Less may be more when it comes to links on this page. To keep people focused on buying the deal Groupon can try removing the top links to Home, Local, Goods, etc.

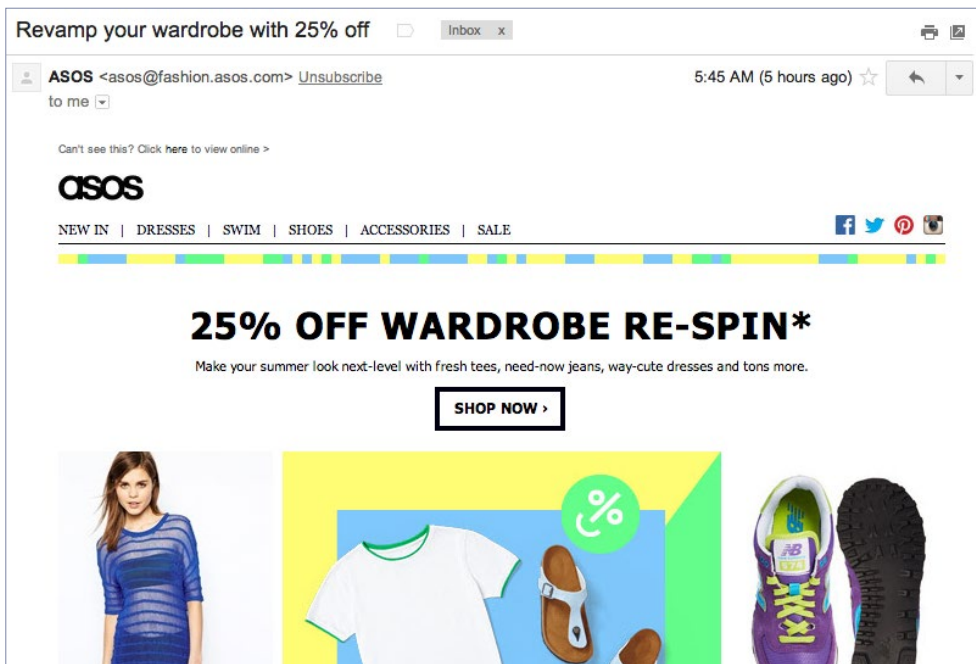
Sale Promotion from Asos

This sale email from online retailer, Asos is an excellent example of a seamless email to landing page experience. The image and headline in the email matches the landing page exactly so the visitor knows she's in the right place. The "Shop Now" call to action is highly visible above the fold and the email is visually engaging.



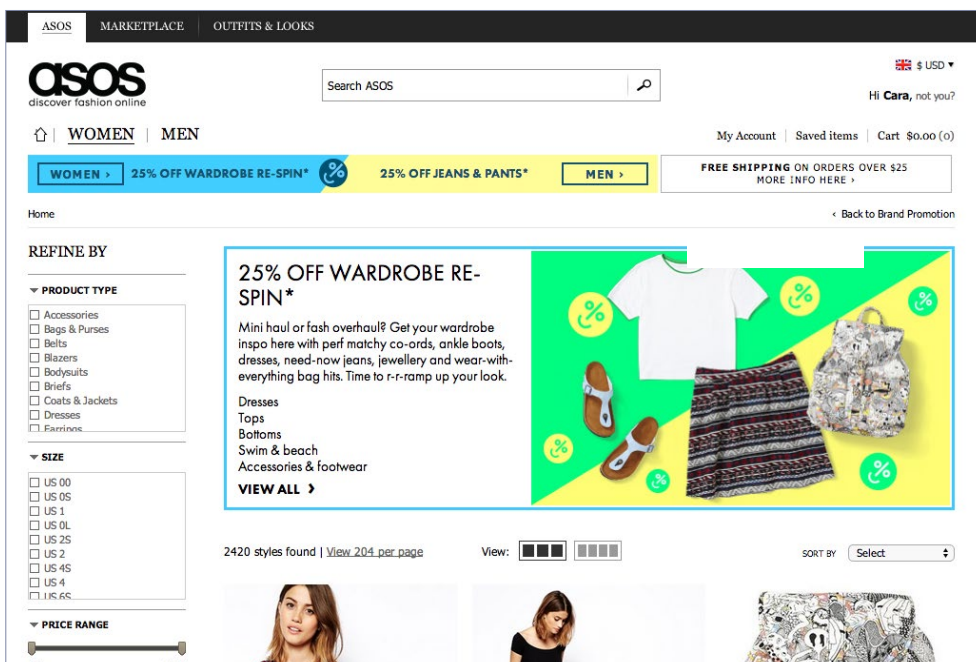
EMAIL:

Test removing navigation and social buttons from email. If the purpose of this email is for people to click to shop, then promoting social channels might be a distraction.



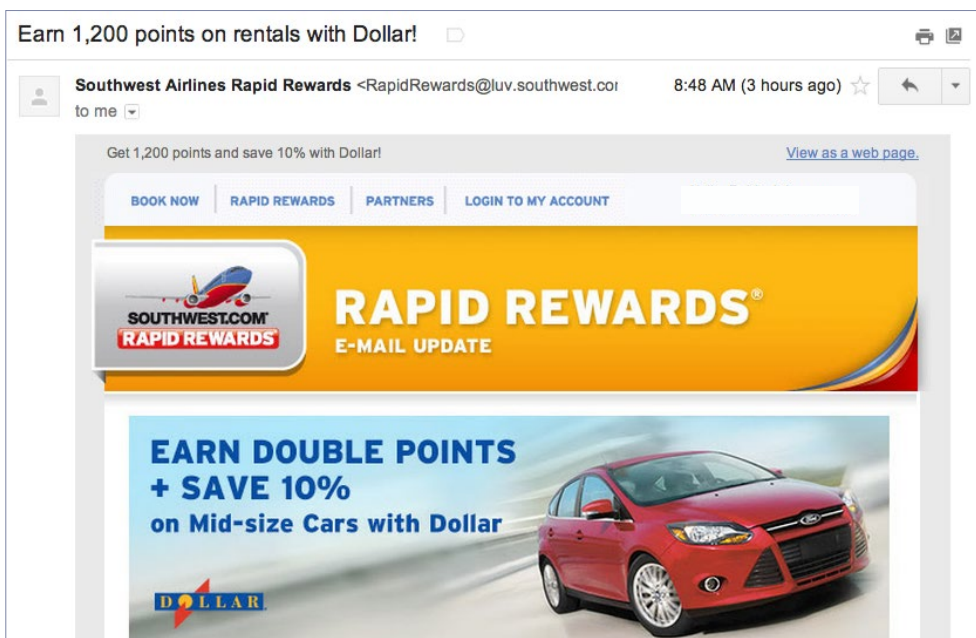
LANDING PAGE:

More personalization. Asos is already personalizing this landing page by using information stored in my customer reference number. They might experiment with the impact of customizing the experience even further. Try making my name larger, making suggestions for what to buy in this sale based on my previous purchases.



Travel Coupons from Southwest

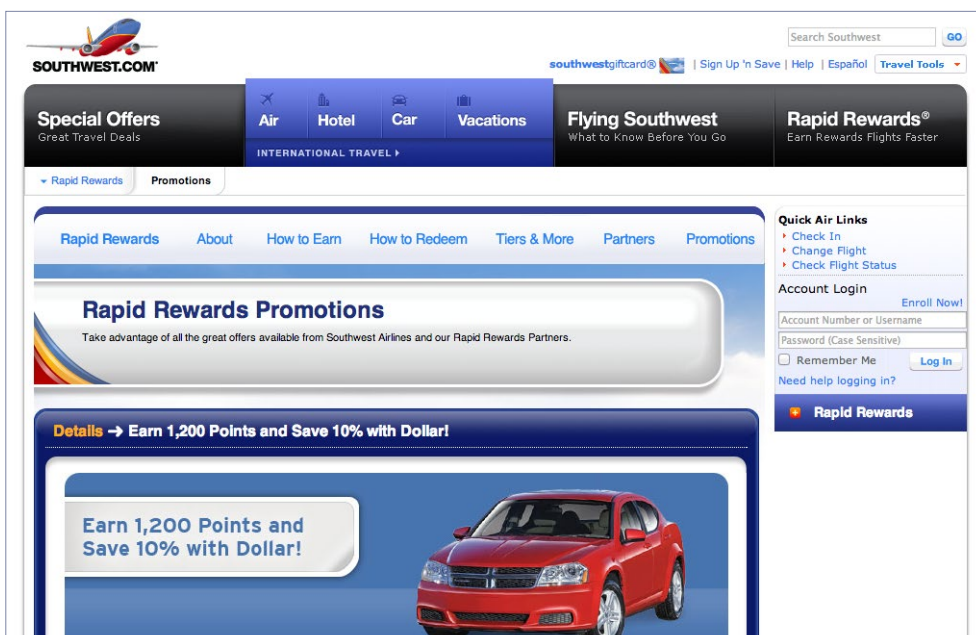
Southwest, the 4th largest air carrier in the US by traffic, uses personalization in their member emails. They use the contact's name and member number. Southwest might try using more information they know about the member to deliver a custom experience on the landing page as well.



EMAIL:

Reduce image height. Visual design is a strength of this email. A negative result of an image-heavy email is the text is pushed down and less visible. Southwest could try reducing the height of the Rapid Rewards banner image to make more room for the text under the main promotion.

Make one call to action button stand out. This email gives recipients many options. Based on the subject line, the main focus is buying the Dollar rental car promotion. Southwest could add a button to the promotion image banner to reinforce the call to action.



LANDING PAGE:

Test adding personalization. By using information about the user on this page, like name, recent trips, recently viewed destinations or upcoming trips Southwest could increase the chance that a person buys the deal. On the far right column of the page, they could add a module that displayed custom information.

Other ideas to test:

TIME OF DAY: The time of day an email is sent could have a big impact on engagement, especially for recurring emails like daily digests or coupons.

DAY OF WEEK: The day of the week can also significantly affect your key emails metrics. Presentation tool Prezi has two distinct users bases: educators and non-educators. They found that educators are much more likely to open email on Monday than any other day of the week.

LINK FORMATTING: Marketo found that making their hyperlinks **Marketo branded purple** instead of the normal underlined blue increased clicks on links.

BUTTON COPY: Instead of generic words like “Submit” or “Download”, test spicing up the action words. Try being more specific about exactly what the action is. Or try making it personal, like “Download My Copy”.

Click to save your own copy of the Email A/B Test Results Archive to keep your tests organized.

“You’re trying to get the right people to open the email. you really should be trying to optimize conversions and revenue through the funnel. All the elements of email chain work together. They should all be working together to drive subscriber to convert and spend money.”

Chad White

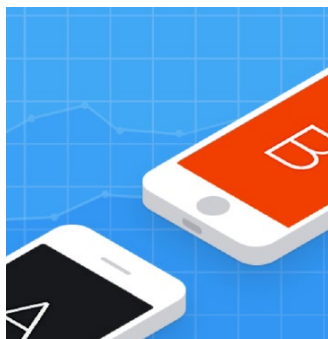
Lead Research Analyst, Salesforce ExactTarget Marketing Cloud

The background is a solid dark blue color, overlaid with a repeating pattern of white line-art icons. These icons represent various business and marketing concepts, including: a target with an arrow, a bar chart, a pie chart, a lightbulb, a gear, a shopping cart, a mail envelope, a smartphone, a laptop, a wrench and screwdriver, a dollar sign with an upward arrow, a speech bubble, a magnifying glass, a globe, a checklist, a network diagram, a download arrow, a cursor, a calendar, a rocket, a handshake, a bar chart, a pie chart, a lightbulb, a gear, a shopping cart, a mail envelope, a smartphone, a laptop, a wrench and screwdriver, a dollar sign with an upward arrow, a speech bubble, a magnifying glass, a globe, a checklist, a network diagram, a download arrow, a cursor, a calendar, a rocket, a handshake, a bar chart, a pie chart, a lightbulb, a gear, a shopping cart, a mail envelope, a smartphone, a laptop, a wrench and screwdriver, a dollar sign with an upward arrow, a speech bubble, a magnifying glass, a globe, a checklist, a network diagram, a download arrow, a cursor, a calendar, a rocket, a handshake.

**The key to successful email
marketing is not about what
you like.**

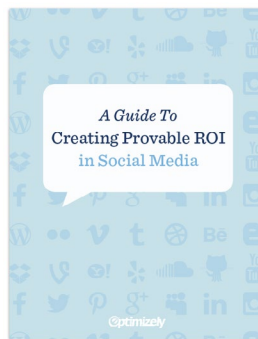
**The key is A/B testing
to figure out what your
audience responds best to.**

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90% of apps are deleted after only one use. It's never been more important to have a mobile app optimization strategy. Learn how with this guide.



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ABOUT THIS GUIDE

The Toolkit for Higher Performing Email Marketing

Written By:

Cara Harshman

Content Strategist, Optimizely

[@CaraHarshman](#)

Designed By:

Jon Saquing

Communication Designer, Optimizely

[@JSaq](#)

Thank you to:

[Jessica Langensand](#)

[Chad White](#)

[Amelia Lin](#)

[Allison Sparrow](#)

Sources:

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- eMarketer, "Nearly Half of B2Bs Expect Marketing Budget Bump in 2014"
- McKinsey & Company, "Why marketers should keep sending you e-mails"
- eMarketer, "Mobile takes an increasing share of e-mail opens"



ABOUT OPTIMIZELY

Optimizely is the world's leading optimization platform, providing A/B testing, multivariate testing, and personalization for websites and iOS applications. The platform's ease of use empowers organizations to conceive of and run experiments that help them make better data-driven decisions. With targeting and segmentation using powerful real-time data, Optimizely meets the diverse needs of any business looking to deliver unique experiences to their visitors.

San Francisco Office

631 Howard Street, Suite 100
San Francisco, CA 94105

Amsterdam Office

Nes 76
1012 KE Amsterdam
The Netherlands



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